BEACON Bridging European & Local Climate Action

# GUIDE TO VIRTUAL COLLABORATION

## Good practices and insights from the BEACON project

On behalf of:

Federal Ministry for the Environment, Nature Conservation and Nuclear Safety

European Climate Initiative EUKI

of the Federal Republic of Germany

**Guide to Virtual Collaboration: Good practices and insights from the BEACON project**

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# 1 Introduction

**Why go virtual**

Out of necessity, the travel restrictions and social distancing measures brought about by the COVID-19 pandemic have forced teams to overhaul their normal ways of working and connect virtually. And while many of us are anxious to resume in-person events and meetings, it is highly probable that with the advent of ever more web-based technologies connecting people, the trend towards virtual collaboration and an increased interconnectedness of the real and the virtual realms is here to stay.

Traditionally, meetings and events held in-person have been considered the most effective. However, given advancements in technologies and techniques, remote meetings have the potential to be as effective and bring with them a number of co-benefits. While the best video conferencing software and online collaboration tools cannot replace a handshake, a chat at the coffee machine, or a hands-on brainstorm, they can open our minds to the possibilities at our disposal and challenge us to adapt to our evolving world, some of the same characteristics that are required in the transition to a climate-friendly future. In addition to saving money, going virtual also results in tangible climate-related benefits such as reduced $CO_2$ emissions from less travel. For these reasons, it is important to hone our digital competencies and learn about good practices in effective virtual collaboration.

**About this Guide**

This Guide was developed as part of the BEACON project as a way to compile and structure the knowledge and learnings acquired by the project team over the course of 2020 and serve as a general guidance document on connecting and collaborating virtually. We lay out organisational and logistical considerations as well as insights on effective facilitation and tools to enhance the virtual experience. This Guide informs how to manifest the potential of virtual meetings to create richer collaboration processes while also becoming more aware of its limitations and potential impact on human connection.

These guidelines can be used as a resource to design, implement, or supplement a range of virtual events including trainings, on-the-job mentoring, coaching, meetings, workshops, seminars, conferences, and more. This Guide offers an overview of **which** elements and tools are involved in the design, implementation, and follow up of online meetings, and **how** they might be combined to create effective, efficient, and impactful collaborative processes.

> **Note:** There is no one-size-fits-all approach. When designing your own online meeting, always consider your situation by reflecting on your team's capabilities and preferences as well as those of all attendees; the technologies and resources at your disposal; the context of the meeting (e.g. decision-making, brainstorming, planning); and the wider socio-cultural context.

Especially since the outbreak of the pandemic, there are ever more resources available on the internet about hosting effective online meetings. This Guide does not aim to be a comprehensive compilation of tools or theoretical knowledge about digital connection but rather a reflection of the learnings from the BEACON project. Throughout this Guide, words like “event” or “meeting” are used interchangeably to describe a general situation in which people are brought together in a structured online exchange. The information in this Guide is applicable to situations that range from small team meetings of

approximately five or more individuals, to larger meetings of approximately 50 people. This Guide does not necessarily cover formats such as web seminars or virtual conferences.
**For a concise overview of the tips outlined in each section of this Guide, please refer to section 6 'Summary Checklist'.**

**Virtual, in-person, or hybrid**
This Guide is about virtual meetings, which assumes the decision to conduct a virtual meeting has already been made. If possible, it is worth noting that the meeting organiser should consider whether an in-person or virtual format is better suited as a first step. To support this decision, Table 1 outlines the general advantages and disadvantages of virtual meetings.

*Table 1: Advantages and disadvantages of virtual meetings*

| Advantages | Disadvantages |
|---|---|
| • Save resources (no travel time, fewer physical logistics to organise, reduced costs)<br>• Reduced emissions from less travel<br>• Lower threshold for participation or more participants<br>• Possibility to "fly in" experts<br>• Stronger focus on content and learning<br>• Easier to record and take notes<br>• Increased productivity and efficiency<br>• More scalability, wider outreach<br>• Conform with all social distancing measures | • Less human contact<br>• Fewer opportunities for interactive formats and networking<br>• Shorter attention span of participants and multitasking<br>• Less visual feedback - body language cues harder to see/read<br>• Less spontaneous<br>• Clear transitions between sessions, less space for soft, in-between communication<br>• Limiting for those less technology literate<br>• Higher rate of registration "no-shows" |

As it has been the case for several of BEACON's activities, distinguishing between a fully in-person or fully virtual meeting is either not possible or desired. In this case, a hybrid meeting is the solution. Hybrid meetings are characterised by a portion of the attendees being physically in one location while another portion joins remotely. Hybrid meetings can be challenging as they tend to exclude remote participants but, for example, with travel restrictions that make domestic gatherings possible but not international travel, hybrid meetings are often the preferred option. In hybrid meetings, facilitators need to make extra efforts to ensure all participants are heard and able to contribute. This might require additional considerations regarding microphones/audio, simultaneous translation, and inclusion of remote participants in group work. The focus of this Guide is on fully virtual meetings, but many of the same considerations apply when organising a hybrid meeting. For more information on hybrid meetings, review the following resource:

- Is Your Team Only Partially Remote? Here's How to Run Effective Hybrid Meetings

# 2 Organising and designing

The BEACON team has found that the organisation and preparation of virtual meetings is arguably more time consuming than for many in-person meetings. Reasons for this may be that the format is often new for the hosts, the hosts have fewer opportunities to improvise, or that technical hiccups are more common or difficult to solve virtually. Preparation for a remote event also has many more dimensions than for an in-person one and often more elements are new to more of those involved. With more new elements comes more uncertainty and a higher likelihood that things may go wrong. Whatever the reason, it is helpful to allocate more time to preparation than you think you will need. The following sections showcase the different elements that need to be considered in the inception of online meetings.

## 2.1 Goals

In a remote work setting people spend a large portion of their day at the computer and in calls, making participation in productive, purposeful online meetings particularly important. When entering into the planning and design phase of virtual meetings, it is critical to consider the reason for meeting, the desired outcome(s), and the intention of the host. This requires the organiser to define a **sharp meeting objective** in advance and design the meeting around it.

Is your intent to create opportunities for new relationships, to collaborate and brainstorm, to train participants, to reach consensus and make a decision, or to build community? **Examine your objective and intention** in detail before diving into the planning process as a clear understanding of your goal can and should influence aspects of your virtual meeting such as length, format, number of participants, and even the use of collaborative tools. If your objective is solely to inform, it is worth reconsidering if a virtual meeting is necessary. Alternatives to purely informational online meetings include web seminars, pre-recorded videos and reading assignments.

Questions to consider when defining the meeting goal include: *Why do we need to bring people together? What do we need to accomplish? Is it feasible within this context? When will this meeting be considered a success?* Answering these questions helps the organiser define topic(s) to be addressed and provides the framework for all subsequent decisions such as number of participants, session format, harvesting, etc.

## 2.2 Invitation

Starting with the invitation, all communication with participants is part of the design of your meeting and should serve your overall purpose. In the invitation, you can start conveying the type of space you want to create for your meeting by outlining this in the meeting goal and reflecting this in the draft agenda to be sent (if applicable).

**BEACON case study:** For the virtual train-the-trainer events held as part of BEACON's vision workshop series, the participants were provided a link to the Vision Workshop Toolkit and requested to review it beforehand as well as bring their physical copy to the virtual meeting. You can find an example of the invitation in Figure 1.

It is important to include any **expectations** you might have of participants (e.g. pre-reading, interactive sessions, etc.) at this stage and be clear about the **technical requirements** (e.g. video conferencing platform and collaborative tools). You can also provide **supplemental material** (e.g. guide to using the video conferencing software or slide deck) with the invite and use it as an opportunity to collect input (e.g. pre-event survey) or information (e.g. full contact details) from the participants in advance. As with in-person events, when the invitation is sent and whether it is accompanied by a save-the-date in advance depends on the context.

### Agenda – Vision Workshop Training of Trainers (ToT) Cities – Poland: 15th + 16th October 2020

**Climate-neutral by 2050: science-fiction or tangible vision?**

BEACON brings to you an innovative participation format that would help you co-create visions of a climate-neutral future with your citizens. The objective: demystify the concept of climate neutrality while creating opportunity to engage with diverse groups of society on the link between climate action and local development.

In this two-day training of trainers, you will learn about the methodology developed for this workshop series; test some of the methods yourself and have time to ask questions and start drafting ideas for your own local vision workshop.

This ToT is based on the toolkit "VISION WORKSHOP TOOLBOX FOR INSPIRED COLLABORATION ON CLIMATE NEUTRALITY". The team will introduce its six key modules. Please bring a copy of the toolkit (digital or printed) to the ToT.

**DAY 1: 15th October 2020, 09:30 – 13:30**

| Time | Agenda Item |
|---|---|
| 09.30 – 09.55 | Log-in time and technical checks |
| 10:00 – 10:15 | Arrival and welcome |
| 10:15 – 10:40 | Why a Vision Workshop?<br>General introduction to the toolkit |
| 10:40 – 11:00 | Module 1 + 2: PREPARE and ARRIVE<br>Training |
| *11:00 – 11:10* | *10 min coffee break* |
| 11:10 – 11:50 | Module 1 + 2: PREPARE and ARRIVE<br>Group exercise followed by Q&As |
| 11:50 – 12:20 | Module 3 – FEEL<br>Training<br>Group exercise followed by Q&As |
| *12:20 – 12:30* | *10 min coffee break* |
| 12:30 – 13:00 | Module 4 – LEARN<br>Training<br>Group exercise followed by Q&As |
| 13:00 – 13:30 | Wrap up module 1-4 and closing day 1 |

*Figure 1: Example of invitation to virtual BEACON event*

## 2.3 Structure and agenda

Once the goal(s) of the meeting have been defined, the organisers must find a structure that fits these objectives while also considering the available tools, participants, and any other requirements or restraints. It is important to create a **structure that serves the intentions and purpose of the meeting** and offer enough space to allow the opinions and creativity of participants to surface.

Just like physical meetings, virtual ones have a beginning, a middle, and an end. The opening and the closing practices create the container in which the meeting takes place and set the tone of the meeting. The central part of the meeting is dedicated to exploring the theme, and the closing to narrow down the results and next steps. The difference with virtual meetings is in the format and

**finding the right rhythm** under new circumstances. Figure 2 illustrates the structural differences between an in-person and virtual meeting in a sample agenda.

| Day 1 | |
|---|---|
| 09:00-09:30 | Welcome, icebreaker, ground rules |
| 09:30-10:30 | CEO-input "State of the Union" |
| 10:30-10:45 | *Coffee Break* |
| 10:45-12:30 | LT Effectiveness: interactive exercise with sticky dots |
| 12:30-13:30 | *Joint Lunch* |
| 13:30-16:00 | Updates from functions: 10x15' presentations |
| 16:00-16:15 | *Coffee Break* |
| 16:15-17:30 | Joint sensemaking: How are we progressing? |
| 17:30-18:00 | Wrap up |
| 18:00- … | *Dinner including team building activity* |
| **Day 2** | |
| 09:00-09:15 | Check-in |
| 09:15-13:00 | Review "Org pulse check": gallery walk on survey findings + so-whats |
| 13:00-14:00 | *Lunch* |
| 14:00-15:00 | Adapting the transformation plan |
| 15:00-16:00 | Personal commitment: who does what by when |
| 16:00-16:15 | *Coffee Break* |
| 16:15-17:15 | Messages to the team: what will be communicate |
| 17:15-17:30 | Check-out |
| 17:30 | *End of workshop* |

| Day 1 | |
|---|---|
| 09:00-09:15 | Welcome, Kahoot quiz, ground rules |
| 09:15-10:00 | CEO-input "State of the Union" |
| 10:00-10:45 | LT Effectiveness<br>• Break-outs on outcome clusters of pre-survey<br>• Report back in group (with timer) |
| 10:45-11:00 | *Break* |
| 11:00-12:30 | Function updates: Breakout discussions based on pre-reading |
| 12:30-13:00 | *Lunch break* |
| 13:00-13:30 | Joint sensemaking: How are we progressing? |
| 13:30-14:30 | Buffer |
| 14:30-14:45 | Wrap up & fun check-out (apartment tours) |
| 15:00 | *End Day 1* |
| **Day 2** | |
| 09:00-09:15 | Check-in |
| 09:15-10:45 | Review "Org pulse check": virtual gallery walk with hosts from pulse check team |
| 10:45-11:00 | *Break* |
| 11:00-12:00 | Silent reflection on so-whats, then joint prioritizing via live-voting |
| 12:00-13:00 | Adapting the transformation plan: live-collaboration in Google doc |
| 13:00-13:15 | Personal commitments in same Google doc |
| 13:15-13:30 | Tasking an LT member with messages to the team; check-out |
| 13:30 | *End* |

*Figure 2: Example of a transformation from a physical to virtual meeting, Source: Dr. Tobias Leipprand*

Some differences and good practices reflected in the agenda of the virtual meeting include an interactive activity at the beginning, shorter input presentation, discussions based on pre-reading, a buffer for sessions that go over time, more breaks, harvesting in a collaborative tool, and shorter overall days. In general, we have found that many things simply take more time, so err on the side of caution when estimating session lengths. Participants also need time to warm up in a virtual setting and may need or ask for more time for discussion.

These elements will be covered in more detail throughout the Guide but when determining the appropriate rhythm or structure for an online meeting, pay particular attention to things like:

- ✓ The length of presentations and sessions
- ✓ When breaks will be needed and for how long
- ✓ How many rounds of conversation are required
- ✓ How much time is required to introduce participants to the tools
- ✓ When interactive elements should be incorporated

The BEACON team has found that some form of **interaction between the participants** should be embedded in the goal and structure of most online meetings as meetings that consist purely of input presentations are generally less engaging and call to question the need to gather participants in one space. **When in doubt, aim for less frontal input and more engagement and participative processes.** TIP

Capture your considerations in a draft agenda and share them with your team or fellow organisers for feedback. Once the general structure has been established, go through the agenda step-by-step, considering possible hiccups, transitions between sessions, and the perspective of the participants. Since participants will not simply be able to chat with their neighbour or grab a snack at the back of the room as they might during an in-person meeting, it is important to give every moment of the meeting consideration. You are done creating your agenda when you are confident that it serves your meeting purpose while reflecting the required time needed and other needs of your tools, participants, and methods. More about the specifics of timing, session formats, and methods can be found in the following sections.

## 2.4 Timing

Determining the timings of the sessions in your virtual meeting is about **managing the energy** of participants. Screen fatigue or digital eye strain is a real problem exacerbated by the shift to remote working. However, reflecting appropriate timing throughout the agenda is a way to reduce exhaustion. There is no right way to plan the timings of your virtual meeting as the attention span and interest of participants, the group culture, and the choice of participatory methods vary from meeting to meeting. But some good practices are generally applicable:

**BEACON case study:** In the BEACON workshop, "Advancing Climate Action and Education for Sustainable Development," with representatives from the education sector in Bulgaria, Czechia, and Romania, a panel discussion was held with five experts before breaking into smaller country groups for in-depth discussions (see our post on the EUKI website here for more information).

- Limit blocks to no more than 2 consecutive hours; 1.5 hours at a time is ideal when you have many participants who are new to the technology.
- Break up day-long meetings into batches of 1 or 1.5-hour blocks followed by a break.
- For a 1.5-hour session, take as little as 30 seconds about halfway through to invite people to stretch and look away from their computer or device.
- For a 2-hour block or more, give participants a 5–15-minute break in the middle, ideally for them to walk away from their computer. As a rule of thumb, give participants a 5–10-minute break for every hour of meeting.
- Plan for breaks of 30 minutes minimum between long sessions.
- For an online event with a lot of sessions, plan to give people more time to recover between sessions than you would in-person.

When not meeting in the same physical location, it is more likely that meeting times may be mixed up across time zones. **Check the time zones of participants in advance and adjust the agenda accordingly. Sending calendar invites to participants and external presenters as well as using timeanddate.com can help avoid confusion.**

TIP

## 2.5 Session formats

While they will likely require modification, the session formats you can choose for your online meeting are essentially the same as that of an in-person meeting. In this section we focus on plenary, input presentations, and interactive group works, as these are the formats most commonly applied in BEACON events.

**Plenary:** This is the part of the meeting where all participants gather in the main virtual room, which is often where the meeting starts and ends. In this session the moderator might introduce the meeting, start an initial discussion, or close the meeting by recapping action points or key takeaways. It is generally good practice to include such sessions at the front and back ends of your meeting to draw participants back to the larger group and objective. In this plenary format, a panel discussion could take place with the entire audience. Keep the session formats in mind when selecting the video conferencing platform as some are geared towards a web seminar format in which only the panellists speak and are visible and attendees can only engage via the chat function.

**Input presentation:** Such informational or expert presentations are often a favourite of meeting organisers. They are generally easy to organise and a way to provide a wealth of information in a short period of time (e.g. 20 minutes). Our experience shows that it is better to limit input presentations to a minimum both in terms of number and time. As mentioned in section 2.2, ideally all necessary informational material is provided in advance so the meeting time can be dedicated to engaging in conversations. However, there are still situations in which a short speaking segment is needed or desired to give participants further direction or inspiration. In such cases, there should be no more than approximately 30 minutes of speaking before there is some opportunity for interaction within the group, often in the form of Q&A. This holds true even if you are working in an educational context as even the most exciting content can become boring over time.

**Group work/breakout rooms:** This is the remaining primary session format and an essential part of participatory online meeting design as it implies interaction amongst the participants. Such groups give your participants a more intimate environment for personal connection. The main vehicle for group work is the breakout room. How breakout rooms are created depends on your video conferencing software, but they can be set up by the meeting organiser or technical meeting producer (see more about these roles in section 2.9). Depending on the objective of the group exercise, breakout rooms can include any number of people. The World Café method works well with groups of four or five (more information in section 2.6). Participants can be assigned to groups/rooms randomly or manually, which is also dependent on the aims of the meeting and makeup of the participants. The groups can either be self-led or require moderation from a select participant or the organising team. How much hosting is required or desired in your breakouts should be decided upon in advance.

**Breakout rooms can also be set up in advance, for example, in the first break, but if set up too far in advance it is possible that participants could leave or join the meeting in the meantime and disrupt the breakout group size or composition.**

TIP

**Breaks:** While not necessarily a session, breaks are an essential part of any online meeting. However, timing is not the only aspect of a break the organiser should consider. Breaks can take multiple forms and online meeting organisers should put some thought into determining the type of break the participants and meeting will benefit from. After all, the break is there to relieve the participants in the hopes that they will give their full attention afterwards.

Some possibilities for breaks include:

- Coffee break away from the computer (e.g. 5-15 minutes)
- Coffee/chat break at the computer (e.g. 5-15 minutes)
- Bathroom break (e.g. 2-5 minutes)

- Lunch break (1-1.5 hours)
- Quick stretch or dance break (30 seconds to 3 minutes)

**Organisers often worry that participants will not return to the meeting on time after a break. Some ways to engage participants and facilitate a punctual start include indicating the duration of the break or a return time on a PPT slide or playing music during the break and turning it off once it is time to resume the meeting. It is also recommended to ask participants to turn their camera on as soon as they return, so the organiser can take attendance and knows when to start again.**

TIP

Incorporate these format options in varied ways throughout the agenda as appropriate. The BEACON team has found that participants notice and appreciate well-thought-out sessions. The benefits are reflected in participant feedback and the meeting outcomes.

For tools to include informal rooms in your virtual meeting, check out the following links:

- Qiqo Chat
- Wonder

## 2.6 Collaboration methods

For engaging meetings, collaboration and conversation should be central. Although meeting sessions come in different formats, for sessions like group work, you will need to be familiar with the practices and methods to host engaging conversations. Some places to start include "The Art of Hosting Conversations that Matter" and "Liberating Structures" to become familiar with more methods that can support meaningful conversations.

The methods used to collaborate in online meetings are similar to those used in in-person settings. Extensive literature already exists on this subject. The following list includes some practical methods that work particularly well in the virtual context:

- **The World Café:** This method involves several simultaneous small group discussions. Pre-defined questions and topics are provided in advance but not the outcomes or solutions. The groups can be rotated to different topics or to mix up the participants. More information about this method can be found here. This format can easily be adapted to the virtual context by using breakout rooms in a programme like Zoom combined with a collaboration space in Miro or Mural. Wonder is another video conferencing tool that make it even easier to rotate participants across groups. Check out this article for more information on designing a virtual World Café.
- **1-2-4-all:** This method is generally held within the span of 12 minutes and is a way to generate questions, ideas, and suggestions with a group. It proceeds in four rounds:
  1 – silent self-reflection on the shared challenge (1 min)
  2 – Idea generation in pairs, building on self-reflection (2 min)
  4 – Discuss ideas from previous round in group of four (4 min)
  All – each group shares one important idea from their discussions with all participants (5 min)
  More information about this method can be found here. This method can work in a virtual format but requires a skilled breakout group organiser to place people in the new rooms quickly and correctly.

- **Questioning:** While not necessarily a collaboration method, questions play a crucial role in participative moments. Questions are often the key to fruitful discussions as they provide direction for conversations and ultimately serve your meeting aims. Examples of question types include how you lead off your small breakout group, what you ask when you check-in with your group; or how you open the floor to gather ideas from the group. All are key choice points in determining the energy of your exchange and the results you will get.

**BEACON case study:** The BEACON team developed a ***Vision Workshop Toolbox for Inspired Collaboration on Climate Neutrality*** to accompany its vision workshop series. This toolbox outlines 27 methods for engaging stakeholders in discussions about what they would like their community or school to look like in a climate-neutral future.

The methods are categorised based on the primary senses they address to make it easier to select elements that are aligned on the specific context, if desired. Methods range from preparatory sensory walks that allow participants to start thinking about climate neutrality and how it relates to their personal life and environment, to role plays that invite participants to design a vision of a climate neutral city while taking into consideration several and sometimes contradictory perspectives. The Toolbox also suggests several methods for sharing the results of the Vision Workshop with the interested public.

While originally designed for an in-person format, the BEACON team has found that many of the methods can be modified to fit a virtual context. You are encouraged to download the toolbox, try some methods out and see if they fit into your virtual climate action events.

The Vision Workshop Toolbox is available in English, Bulgarian, Romanian, Polish, Greek, and German.

For more inspiration on approaches to collaboration, check out Appreciative Inquiry, Pro Action Café, or Open Space Technology.

**Energisers/Icebreakers:** Engaging energisers and icebreakers are also often part of successful online meetings. Often used to jump-start the meeting and improve energy levels at the beginning or after a break, this category of activity has its own set of methods.

Some examples of virtual icebreakers include:

- **Counting from 1 to 20:** Have the group count off from 1-10 or 1-20 consecutively. The same person cannot say two consecutive numbers and if two participants speak at the same time, the group needs to start over again. This method is ideal for groups of around 10 participants.
- **Questions:** Pose one or more thought provoking questions to the group. The word cloud function in Mentimeter is a good tool to use for this exercise (More on Mentimeter in section 4.2.2).
    - "If I was to be famous for something it would be…"
    - "My perfect weekend is…"

  - "When I woke up this morning, I thought…"
  - "Where is your office right now"
- **Touch blue:** The facilitator calls out something to touch, for example, "touch blue!". Each person then must move and touch something with that colour (a blue marker, a blue book, etc.). The facilitator continues, "touch red… yellow… something fluffy…"
- **Drawing together:** The whiteboard function of the video conferencing programme can be used to jointly draw a picture with participants. This method is particularly fitting for after a lunch break and the results of this exercise can be a fun workshop output that is included in the event documentation.

This section only touches the surface of the types of methods that can be used in interactive online meetings. The methods you select depend on your participants, experience, and the aims of your meeting. As mentioned previously, it is important to think through each step of the method you select from the participants' perspective (e.g. timing, number of participants, questions, documentation, facilitation, etc.) to ensure that the method can achieve the desired result.

Further resources:

- Database of knowledge sharing methods (FAO, UNICEF, UNDP, CGIAR, KM4Dev)
- International Association of Facilitators Methods Library
- Gamestorming - a set of co-creation tools used by innovators around the world
- 100 Best Team Building Activities
- Virtual Meeting Check-Ins & Icebreakers During A Pandemic

## 2.7 Harvesting

In this Guide, harvesting can be understood as capturing information and outcomes from an event. Although the actual harvesting of discussions and outcomes from the event is done during the event itself, the virtual meeting organiser should certainly consider how this should be done in advance. In an in-person meeting, harvesting meeting outcomes is often an organic process or something that can be done more spontaneously. In a virtual setting, however, such spontaneity may not be available.

Often harvesting can be as simple as note taking, either collectively or by a single individual. Individual note taking is straightforward but for **collective note taking**, the organiser should prepare a shared document with editorial access to all relevant persons in advance. Ideally the document should show changes in real time or a designated note taker should be allocated to each session to avoid conflicts amongst the editors. In breakout rooms, the groups or moderator can select one scribe or note taker. **The event organiser should ensure that note taking is arranged in every session where it is necessary, including both breakout groups and plenaries.** TIP

**Graphic recording** (also called visual scribing or graphic listening) is another popular option for harvesting. Graphic recording involves the use of words, sketches, and colours to capture meeting discussions and ideas and can serve as a helpful facilitation tool. For more information on this method or to find a graphic recorder for your event click here; more information on how to set up graphic recording in a virtual setting can be found here. Before using graphic harvesting, the meeting organiser should consider what they would like the graphic harvester to capture, how it will be used/displayed in the meeting and how it will be shared with participants afterwards. Sharing the recording with participants can be even easier in an online format as it will likely already be in digital form. Another option would be to send a hard copy of the recording to meeting participants via post.

In addition to note taking and graphic recording, the wealth of **online collaboration tools** provides further options for visual harvesting. The type of visual harvesting that can be done with such online collaboration tools (see section 4.2 for more information) varies depending on the platform and can range from a simple list of discussion results to grouped post-it notes to elaborate mind maps. Regardless of what format the selected collaboration tool allows, the meeting organiser should determine in advance how the content can be edited (if needed), shared, or downloaded at the conclusion of the meeting. For example, your research might reveal that it is not possible to download a readable file, so you might need to take a screenshot during the meeting.

Other staples of the harvesting from virtual meetings include **screenshots** of participants. This can include posed group photos or photos during interactive activities like energisers. Consider in advance when you might want to take a photo and account for this in the event script, so you do not forget. Don't forget to ask for permission before taking the screenshot. **Recording** the session should also be considered in advance and incorporated into the script as the recording may need to be paused in the case of breaks. The recording can be shared with participants after the meeting or made available to a larger audience but as with screenshots, always ask for permission to record and let people know that they can turn their video off for the recording if necessary.

In many cases the virtual meeting is only the first step in a longer process, which makes it especially important to capture and share the results. Between note taking, graphic recording, and visual harvesting from online tools, there are numerous ways to harvest effectively and make the most of your meeting.

## 2.8 Script

Particularly in larger, longer, or more formal online meeting settings support from a larger team is required. In such meetings, the agenda and methods used may require tasks to happen simultaneously or in quick succession. This is why it is important to **divide roles and responsibilities** (see section 2.9 for more detail) amongst the team in advance and in writing in the form of a script or detailed agenda. This is essential for keeping everyone on the organising team on the same page and informed about who does what when.

The BEACON team uses such a script in any larger meeting or workshop and has found it to be particularly helpful. You can **download BEACON's script template** here. The script consists of a table outlining each task throughout the meeting and allocating it to a particular team member or role. Depending on how your team works best, it could include more or less detail. Scripts used in BEACON events might include:

- Talking points
- Exact timings (even those not mentioned in the participants' agenda)
- Notes about the breakout groups (group size, timing, moderators, message to broadcast)

- Hints about simultaneous translation (turning it on, which languages can be found in which channels)
- When to start, pause, and stop the recording
- Who is sharing their screen
- When the host should be switched
- When someone will request remote control
- Links to relevant shared documents/tools (shared notes file, Mentimeter survey)

TIP

**The BEACON team has found that it is particularly helpful to "walk through" the agenda with this script open so the team can identify and immediately fill any gaps.** Once final, it is recommended that the organising team print it out for the actual meeting, so there is one less window they need to think about being open on the computer. While structured, a script is not meant to be rigid or restrict the team. On the contrary, the script can **facilitate flexibility** and allow the team to quickly react or change course if needed. When all team members are informed about what should happen behind-the-scenes, they can easily adjust the agenda on the fly or step in for each other as needed. Those are the benefits of a detailed agenda and a well-prepared team.

With a detailed script, the virtual meeting organiser has the last piece of the puzzle and is ready to put their preparation to the test in the next phase: facilitating and moderating a virtual event.

## 2.9 Roles and responsibilities

First, to ensure quality facilitation of your meeting, a number of roles and responsibilities should be distributed amongst the hosting or organising team in advance. The number and breadth of these roles and responsibilities depends on the size and complexity of your event. The higher the stakes and complexity of the meeting, the more roles and tasks are needed. Some roles that are helpful to define in advance include:

- **Main moderator:** Leads/moderates participants through the programme and discussions; has a clear overall view and the ability to deal with the multiple elements involved in hosting the meetings; not necessarily topic expert
- **Fallback moderator:** Steps in if moderator has technical issues or is otherwise unavailable
- **Assistant moderator:** Monitors the chat, questions, and mood of participants
- **Producer:** Focuses on logistics and technology issues; manages things like breakout rooms, interpretation channels, collaboration tools, and harvesting visuals, etc. is the main contact person for the interpreters; participants should contact them with technical questions
- **Breakout group leads:** Facilitators for each group who help make the transition to the breakout groups and leads a discussion
- **External speakers:** Joins all or part of the meeting to present or contribute on a specific topic. Speakers should be thoroughly briefed in advance and have a dedicated point person in the organising team such as the assistant moderator or producer.
- **Interpreters:** see the box below on the involvement of interpreters

In addition to the roles outlined above, some tasks that often need to be allocated to the team in advance and can overlap with the roles above include **note taker, timekeeper, and screen sharer,** to name a few. Instead of relying on the organising team, it may be possible to engage participants and ask them to volunteer for these tasks. This is one of the many ways to engage participants. For a recurring meeting, the roles could be rotated from meeting to meeting amongst participants in advance in the form of a lottery so nobody knows who will be lucky to be the timekeeper or scribe. If multiple people will take notes over the course of the event, it is important that all have access to the shared file for the minutes. As noted in section 2.8, this could be included in the script or detailed agenda.

**BEACON case study:** During an online training the team noticed it was particularly helpful to take notes and collect feedback in a shared document as it allowed them to quickly adjust and improve subsequent sessions in the same event.

In team meetings, participants could run the meeting themselves instead of using a designated moderator, giving participants more ownership over the online meeting experience.

**Regardless of the complexity of the meeting, it is important for the organisers to be explicit about who does what and not assume that someone will do a task during the meeting as it can be difficult or come across as unprofessional to course correct during the meeting.**

TIP

**Note on simultaneous interpretation:** If you opt for simultaneous interpretation in your meeting, the interpreters will also play an important role in the event. While this Guide will not go into full detail on this topic, we can share several pointers from BEACON events:

- ✓ Involve interpreters early in the planning process
- ✓ Test the interpretation function in a test call with interpreters and a sufficient number of additional participants depending on the number of interpretation channels
- ✓ Include the interpreters in the behind-the-scenes communication channel of the organisers (see section 3.1 for more details)
- ✓ Be aware of interpretation restrictions in the video conferencing software such as in breakout rooms or when joining the meeting via the browser
- ✓ Have the interpreters turn off their camera in the meeting but rename themselves as the interpreter
- ✓ Remind participants to speak slower and clearer
- ✓ Remind all speakers (and participants) to use headsets so they are clearly understood by interpreters

## 2.10 Technical test run and rehearsal

The last thing that should happen before holding the meeting is a test run or rehearsal. The **rehearsal** is a run-through of the entire programme and includes all individuals on the organising team. While it is easy to think that certain sessions or aspects like PowerPoint presentations do not need to be rehearsed, technical hiccups or knowledge gaps can still arise even in sessions that seem simple, making this practice time invaluable. It is during this rehearsal that the script should be consulted and adjusted as needed. The BEACON team has also found that flipping through the slide deck during the rehearsal is helpful and that, in many cases, it is better to combine all presentations into one.

**BEACON case study:** Although the team was already familiar with the video conferencing software, Guidehouse held a short call with the partners to test tools like Mentimeter, Groupmap, and Ka-hoot, ahead of our twice yearly Coordination Meeting. After this test, Guidehouse was able to adjust the settings and roles, so our meeting could run much more smoothly on the actual day.

Unlike the rehearsal, the **test call** involves the participants and external speakers. It is a short call of maximum 30-minutes to get everyone acclimated to the video conferencing software and any other tools and concepts that will be used in the virtual event. Explain new tools carefully and check for understanding. The first time participants use a tool, explain how it will look to them on-screen, what they should do, and how to get help. In the test call and actual meeting, make sure everyone is ready before diving into the tool by asking for a signal like a thumbs up and be sure to repeat instructions clearly. **If you are using simultaneous translations, it is recommended to invite the translators to this meeting. Often a brief test call (of approximately 15 minutes) is covered in the fees of translators, so they may be able to join at no extra cost to the organisers.**

TIP

Such pre-event calls also present an important opportunity to check **everyone's equipment** (e.g. headphones, internet connection) as well as the navigation between the different software, documents, audio-visuals, etc. To support this, it is highly recommended that the meeting organisers have two monitors. It is also advisable to have **backup equipment** such as an extra headset available and if possible, high-quality equipment like noise-cancelling headsets. You can also use this time to check **your appearance** in the call, it is important to ensure that your face can be seen clearly and that you reduce light sources coming from behind you. Consider also creating a tidy, pleasant (e.g. with plants), or plain background to the extent possible.

Such prep meetings may not be required for virtual meetings with lower stakes but in meetings that involve, for example, extensive behind-the-scenes support, new technologies, or high-level guests, this extra level of preparation is recommended. Both activities should be done a few days before the meeting on the desired platform to allow enough time to remedy the issues that may arise.

# 3 Facilitating and moderating

Effectively facilitating and moderating an online meeting is equally as important as the preparatory work outlined in the previous section. Particularly in online meetings, it is more difficult to maintain your audience's attention, so connecting with participants, minimising technical hiccups, and effectively guiding them through the agenda is critical. Some of the skills for effective online facilitation overlap with those of in-person meetings but some are unique to the virtual context. Those are the focal point of the next section where we outline a mix of technical or organisational tips and ways to connect with the meeting participants. Unlike the previous section, this section focuses on what should happen during the meeting.

## 3.1 Communication amongst organisers

During the event, the organising team may need to communicate with each other behind the-scenes, outside of the live video call. For communicating amongst each other during the event, it is helpful for the organising team to use a communication channel in the background that is **separate from the platform used for the event**. If you are conducting the meeting in Zoom, for example, you might be tempted to think that you can communicate with the private Zoom chat function, but for several reasons this might not be ideal. Perhaps it is not possible to include all of the relevant people in one chat session, you would like to avoid chat windows popping up on a shared screen, or you would like to protect yourself in the case that the video conferencing system fails, thereby eliminating your primary channel of communication. For these reasons, we have found that using a separate platform is preferred. **Additionally, we have also found that it may be better to use a different platform on a different device such as Telegram, WhatsApp, or Slack on mobile phones to avoid any confusion with chat windows or shared computer screens.**

TIP

All organisers, translators, and other key team members should be invited to such a group. It can be used to share issues surrounding breakout groups, translation, timing, talking points, technical issues, and general trouble shooting.

## 3.2 Check-in and technical introduction

Now that you are in the online meeting, your preparatory work can begin to pay off. Ideally the organiser would have already shared a wealth of information with the participants regarding technology and expectations beforehand but it is worth reiterating once in the meeting. Before diving into the content of your meeting, it is important to set the scene in terms of technology as it can make or break the success of the meeting and define the quality of interaction amongst participants.

Before the meeting really begins, consider organising a **check-in session in the 10-30 minutes before the meeting** is kicked off. During this time, participants are encouraged to join the meeting to test things like internet connection, sound, and video. As the moderator may be busy preparing to start the meeting, we have found that it is helpful if the producer engages participants, also individually, as they join the meeting. The BEACON team has found that more time should be allocated to this session if the technology is new to participants or organisers or if simultaneously translation is being used.


*Figure 3: Example of slide to display during check-in session*

To help convey technical tips, consider sharing a slide on your screen with pointers in the target language(s) such as the example in Figure 3. Such visual instructions can be more helpful for the participants than verbal cues and reduce the amount of moderation required by the project team. Ideally it would have already been done, but all participants can use this time to ensure they have sufficient lighting and make last minute adjustments to their background as needed to reduce visual distraction. Another benefit of starting the meeting early is that ability to bond with those who arrive early. Having small talk helps create a relaxed atmosphere and contribute to people's feeling of connection.

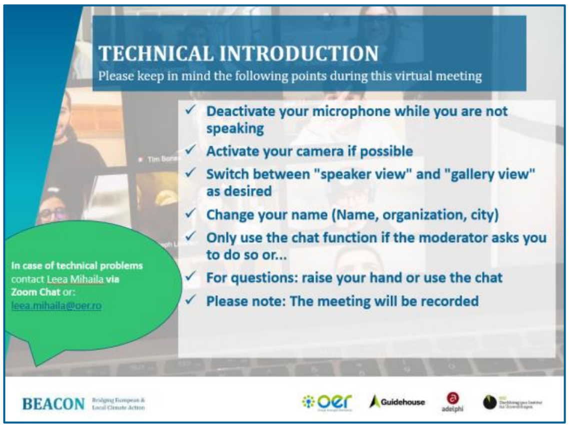


*Figure 4: Example of slide to display during the technical introduction*

After the check-in has ended and you have welcomed participants to the meeting, it is helpful to provide another short **technical introduction**, which can be combined with **establishing etiquette or ground rules** for the meeting. Such a session is particularly helpful in more formal meetings or events in which the participants are not already familiar with your ways of working. Since everyone has experience attending in-person events, many may think that certain elements of the meeting are understood by everyone. In the relatively new world of online events, however, new conventions are still emerging. That means that although it may not be common to lay strict ground rules in an in-person meeting, it is still polite to specify things like the expected level and method of engagement (e.g. "Please use the chat for X, not Y") in the virtual context. To reduce misunderstandings, we also recommend providing any instructions in writing alongside the spoken version. See Figure 4 for an example of the ground rules set in many BEACON meetings.

During this session, you could introduce the mute/unmute button and invite everybody to unmute and say hello in their language at the same time and then request all to stay muted whenever not speaking to reduce background noise. You could clarify how to signal a wish to speak, how you will acknowledge that wish, and a request to keep any extraneous questions or discussion points to the end of the meeting. You might also introduce the function for renaming users and ask participants do so in a way (e.g. first name last name, country) to facilitate attendance taking or the formation of breakout groups.

**Similarly, the BEACON team found that its helpful if at least one person on the organising team has a (printed) list of participants at hand.** This proved to be particularly crucial in one event as, contrary to what we anticipated, the participants were technically unable to rename themselves. This was important for the breakout groups in a subsequent session but since this hiccup was identified early in the check-in session and the organisers had a participant list, they were able to rename all attendees before the official portion of the meeting began and avoid any further hiccups.

TIP

## 3.3 Kicking off the conversation

Once ground rules have been set and all participants are familiar with the technology, the moderator can begin another sort of check-in/icebreaker – this is the time to **jump-start a productive conversation** with participants and take the temperature in the room. You may be tempted to skip this part of the meeting, if, for example, you know the participants well or are already running a few minutes behind schedule, but this **3 to 10-minute process** of breaking the ice and understanding how your attendees are arriving at the meeting can have a huge impact on overall meeting effectiveness. You can demonstrate the importance of this check-in by listing it as the first item on the agenda. In many cases 5 minutes will suffice, but it can take more or less time depending on the number of participants.

To start the dialogue with attendees you can do numerous activities. You might start simply by posing an open-ended question to the group and allow everyone to share their answers verbally or in an online poll, for example:

- *What's the one word that best describes how you're feeling at this moment?*
- *How's everyone doing?*
- *What is your current energy level on a scale of 1-5?*
- *What's one word to describe how you feel right now?*

In some cases, you might find that it is easier to introduce the check-in practice by using questions that focus more on the meeting content:

- *What is one thing you hope to accomplish in this meeting today?*
- *What are you looking forward to in this meeting?*
- *What questions do you think need to be addressed in this meeting?*

Answering these questions in a rapid-fire way can be a quick and fun way to engage the attendees.

See more about icebreakers in section 2.6. If you have not already done so, consider incorporating **context-setting** at this point in the meeting. This can include telling your participants what they will experience and why they are gathered, giving them guidelines for how to be in this setting, and what they can expect from themselves and each other. This can help reassure your participants and put them at ease and can be done before or after the icebreaker.

These types of check-ins/icebreakers have several benefits. They contribute to building **mutual trust** and positive relationships and they help people feel more comfortable speaking up later in the meeting. Such exercises also give the moderator a quick assessment of interest/attention spans/ mental states in the virtual room, which helps them adjust the way they facilitate the meeting, ultimately giving them more credibility. For example, if through this exercise it becomes clear that most participants are tired, you might try to introduce more short breaks or energisers throughout the event, which will be appreciated by participants.

Starting a meeting with a check-in might be unfamiliar in your organisation. In some cultures, it can be seen touchy-feely or as a waste of time. **Do not expect everyone on your team to embrace this practice on the first try.** If you are the team leader, you can set the tone by modelling good check-in behaviour. Be patient. Give people time to get comfortable with the check-in process and soon others will speak up. Once checking in has become a standard aspect of your team meetings, you will likely find that not only are your meetings more productive, but your team relationships are stronger.

Further resources:

- Effective Ways to Start Meetings
- Digital Warm Up Guide
- Virtual Meeting Check-Ins & Icebreakers During A Pandemic

## 3.4 Connecting with the attendees

It can be difficult for a moderator to read the room and keep attendees engaged in an in-person meeting, but these tasks are even more difficult behind a screen with limited nonverbal cues, connection problems, and distractions. Luckily there are plenty of things moderators and facilitators can do to minimise the pitfalls and get the most out of online meetings. This section will cover general tips not covered in other sections that should be employed, primarily by the moderator, throughout the meeting. The tips below are from the report *Leading Groups Online: A Down-And-Dirty Guide to Leading Online Courses, Meetings, Trainings, and Events During the Coronavirus Pandemic* by Jeanne Rewa and Daniel Hunter, which can be found here.

**Minimise multitasking:** Rewa and Hunter suggest that “the temptation and likelihood of participants getting distracted or multitasking is significantly higher than when in-person. This challenge should not be underestimated and impacts every aspect of how we lead online.” To tackle this, you can set the expectation beforehand in the invitation or in emails. Indicate that you see distractions as a challenge to successful collaboration and/or explicitly encourage participants to limit their distractions. They suggest to convey this subtly by saying something like, “Prepare yourself to be fully present during the session. Do you need to remove a pet from the room or hide your mobile phone? We won’t be using email during this session, so you can close your email inbox, too, if it’s open!”

**Engage often and in different ways:** This should have already been accounted for in the design of the agenda but must still be executed well throughout the session. Consider the different communication and learning styles that might benefit your group. To keep attendees (and the moderator!) from getting bored or distracted, ask questions, limit the use of slides, use different session types and methods, include interesting visuals, or employ self-led activities such as journaling or reflection. Varied activities also give the moderator and organisers time to take a breath, regroup, or adjust the plan. Rewa and Hunter advise "to not have anyone talk for more than 3 to 5 minutes at a time without pausing for at least a simple interaction with participants (e.g. yes/no question or hand raising)." Also prioritise engagement over input when connecting online by "checking to see if there is information sharing that you could move to outside your live sessions" via, for example, video, documents, or email. An engaging moderator is also attuned to the energy levels of the group and can invite others to join them in checking in on their body via a short stretch, inviting people to look away from their screens, or taking a 2-minute bathroom break.

**BEACON case study:** In a thematic workshop, BEACON partner SEVEn, linked offline and online elements to engage participants. They sent each participant a postcard from the host municipality Roznov, which included their team assignment. The teams were then used throughout the workshop in fun, short pub quizzes. The winning group received their prize via mail.

**Track attention:** As many of us have experienced, Rewa and Hunter explain that a common challenge in leading online is that we end up in a one-way conversation in which we do not know whether people are listening or even awake! To remedy this, facilitators try to read peoples' videos but this can be inaccurate. Thankfully, there are other strategies for taking the temperature in the room. They suggest that the moderator can include live polling, ask people to share in the chat or out loud the answer to a simple question or two, or use general check-in questions such as, "Is this clear so far? We could break now or continue for five more minutes. What is your preference?" Checking in is particularly important for those joining via phone. The dialogue below is an example of how Rewa and Hunter propose to handle this situation:

> *"Does anyone have any questions before we move on? You can type in the chat or if you are on the phone or prefer to share out loud, you can come off mute. [Get some responses in the chat.] Okay, I haven't heard from several people on the phone so I just want to check to see if you have any more questions on the phone before we continue. I'll pause a few moments so you can come off mute if needed...[pause at least 5 seconds]."*

**Let people know you see them:** Good moderators should make it clear that they are continually reading the group so that people will feel appreciated and contribute. When this is the case, Rewa and Hunter explain "they are also more likely to send you clear nonverbal signals through their web camera when they get the signal that someone is looking back through their screen." They provide some helpful examples of how the facilitator might send those signals:

- *"I see [name] that you just came off mute. Is there something you'd like to add?"*
- *"I see a lot of people are saying 'yes' in the chat box, so yes, let's shift to talking about the second topic."*
- *"I see a lot of heads down on the web cameras, so I'm going to give you a little more time to write."*
- *"Everyone has shared except [name] and [name] who are on the phone. Would you like to share, too?"*
- *"It looks like [name] has stepped away, so we'll come back to them when they're back."*

The above assumes that participants' cameras are on. Having cameras on is indeed ideal and should be encouraged by the facilitators to improve engagement and focus on the meeting. Make it clear up front that this is your preference in the technical introduction. Although not as insightful as in in-person meetings, much can be learned from faces and the nonverbal cues that make it through the webcam. Similarly, consider taking the slides down and not sharing screen when not needed or during a discussion, so that all participants can better see the whole group in gallery view.

**Recognise peoples' emotional state in the pandemic:** Every participant in your online meeting is experiencing the COVID-19 pandemic differently. Some do not have proper computer equipment, others may be taking care of children at home, some may be at risk of losing their job, and others may be going stir crazy in a small apartment. Linked to some of the aforementioned facilitation tips is the need to create space for people to acknowledge their emotions and challenges. In addition to the ideas already mentioned, some ways for the facilitator to create this space include lightening the mood with music and a dance party, leading the group through stretches in their chairs; facilitating a short meditation session with the group; ending the session early, or having people share one thing they are doing to stay grounded.

**Make space for everyone:** It is the moderators' job to make sure all participants can contribute to the meeting. There are many ways to ensure everyone is heard. First, make sure all required can attend the meeting by checking their time zone and tech capabilities (e.g. providing a phone number to dial in). When in the meeting, make sure everyone (not just the same few people) has room to speak, has introduced themselves, and feels that their contribution is valued. Some ways to do this include the use of an on-screen timer to limit lengthy interventions or use ELMO (Enough. Let's Move On) cards if a participant starts to dominate the discussion. For these tools to have the desired effect, they should be properly introduced by the moderator. Another less intrusive tool is simply to embrace silence. Waiting through an uncomfortable silence might give quieter participants the courage to speak up or launch an interesting conversation that would not have happened otherwise. This is uncomfortable but can be a valuable tool. Other ways to involve shy participants include round-robin or tour de table style sessions, small breakout groups, one-on-one discussions, or written inputs.

**Stay on track:** Moderators can gain credibility with the group if they stick to the meeting goal(s) and agenda. This can be done by sharing the meeting goal and desired outcomes at the start and then sprinkling references to it throughout the programs or directly in the slides, so it is top of mind for all participants. To work towards these aims, facilitators should decide how to capture decisions, responsibilities, and next steps and share these with the participants, ideally both verbally and in written format (e.g. directly on the shared screen).

Like the goal, the agenda should be shared in advance, at the beginning of the meeting and throughout the event. It is OK if the meeting is running behind schedule or if you do not want to cut the discussion off to allow group dynamics to flow but communicate with the group how you intend to handle the situation. Make references back to the agenda throughout the meeting. Often participants may become antsy if it is not clear that the moderator is aware of or in control of deviations to the agenda. Tools to help the group stay within the designated time limits include cards that can be held up when the speaker is out of time or a digital timer that is showed on the shared screen. In addition, moderators could indicate that they are in command of the agenda with the following sample phrases:

- *"I see that we are 10 minutes behind schedule, but I would like to wrap up this discussion before taking a break. We will shorten the presentation after lunch, so that we can still end on time."*

- *"Is everyone OK if we shorten the coffee break from 15 to 10 minutes, so that we begin the next session on time?"*
- *"Our guest speaker had a personal emergency and will not be joining us today. I would suggest we add 10 minutes to the group work in breakout rooms and end the meeting 15 minutes early. Is that OK with everyone?"*

With good preparation and facilitation skills, your meeting is likely to be a success but it is important to release yourself and your group from perfection. Despite your best efforts to prevent them, it is possible, even likely, that technical problems both within and beyond your control will still occur. Prepare yourself for the reality that things might not go as planned and be open with the group. Communicate calmly and clearly about how the situation is being handled. Regardless of your problem, your attendees are likely to be appreciative and patient if you communicate effectively with them.

Further resources:
- Boosting Connection and Crushing Loneliness
- The art of connecting online: 7 social innovation insights
- How to Connect Meaningfully in a Virtual Meeting

## 3.5 Check out and closing

Just as you checked in with participants at the beginning of the meeting, you can check out with them at the end to get a sense of the group's temperature before parting ways. You can ask some of the same questions such as *How's everyone doing?* Or *What's one word to describe how you feel right now?* Or you can check whether their expectations have been met with questions like *Do you feel like we accomplished our goal with this meeting?* This can be done verbally in plenary or in the chat. You could also collect more detailed feedback in the form of a live survey (via Mentimeter for example) or poll (see section 3.6 for more survey ideas).

Before closing the meeting, it is important to capture and communicate any agreements, next steps, tasks, or responsibilities going forward. Similarly, it is useful for the moderator to highlight some key insights and outcomes collected throughout the event before moving to a close. If you held any questions or items until the end, revisit them before closing. For all these issues, there should be sufficient time allocated in the agenda. Lastly, it is important to thank participants for attention and end on a high note.

## 3.6 Follow up

After the meeting has ended, it is important to follow up with participants. **Follow-up communication** with participants could include sending a thank you email, along with the meeting report, a short list of action points, or any other relevant resources like graphic recordings, harvested brainstorm results, handouts, etc. It is important to indicate, for example, whether any action is required by participants or if a follow-up meeting will take place. A follow-up communication is also a good opportunity to **share the link to a recording** of the session or a feedback survey. If sharing a link to a recording, double check that it can be easily accessed and provide any information they might need to view the file, such as a password. Recording your meeting is a great option for those who cannot attend but, before doing so, make sure all participants agree to it. With Zoom, for example, you can predefine that those with camera off do not appear in the recording.

**Survey tools:**

- SmartSurvey (used by BEACON)
- Mentimeter (used by BEACON)
- PollEV
- SurveyMonkey
- Typeform

As mentioned, surveys can be conducted in the meeting itself or afterwards. A **feedback survey** is a helpful way to reflect upon and improve future online meetings using the perspectives of meeting participants. To do so most effectively, it is recommended to design your feedback request already in the preparation phase and in tandem with the meeting objective(s). Many of the same survey questions that apply to in-person meetings also apply to the virtual setting, but some examples of survey questions specific to an online meeting format include:

- *How would you rate the accessibility of the event?*
- *Did you have sufficient opportunities to connect with other participants?*
- *How easy was it to navigate the video conferencing and/or collaboration platform?*
- *What were your favourite features in the video conferencing and/or collaboration platform?*

# 4 Collaborating

As mentioned, one of the primary reasons we bring groups together online is to engage in real exchange and collaboration between participants, as opposed to simply sharing information. All the information provided in sections 2 and 3, help meeting organisers prepare and facilitate this process but the space in which we do so, and the range of our interaction is defined by the online tools we use. Whether for video conferencing or brainstorming and decision-making, this section focuses on some software or platforms that can enable the online collaboration experience.

## 4.1 Video conferencing platforms

For the small to medium sized meetings and events addressed in this Guide, video conferencing software is required. The selection of a video conferencing platform depends on the meeting requirements, the programs used and allowed by your organisation, and the availability of the platform to your event's attendees. Before selecting a software, it is worth checking that it supports other basic functions that your meetings will require such as breakout groups, simultaneous translation, or reaction buttons.

**BEACON case study:** The BEACON team found that it can be helpful to provide your own guidelines to using video conferencing software and has created a 'Participants Guide to Using Zoom' as well as instructions for hosts and interpreters in meetings where simultaneously translation is being used.

It is important that the hosts familiarise themselves extensively with the settings of the software in advance as they will serve as the technical meeting producers and will be required to support users in accessing the platform. If you learn of any restrictions that may impact your event such as limited functionality when joining through the browser as opposed to the full application, communicate this to participants in advance and work out any kinks in the test call as described in section 2.10.

## 4.2 Collaboration tools

In many virtual meetings and events there is a need for participants to not only speak and see one another, but to interact with each other in brainstorming, problem solving or decision-making processes. Video conferencing tools offer some **built-in functionality** in this regard such as screensharing, whiteboards, mark up options, breakout groups, and polls, but there are other tools that extend beyond these capabilities and can be integrated into online meetings for enhanced collaboration.

TIP

**The BEACON team has found that often less is more when it comes to online collaboration tools as elaborate tools can increase the complexity of the exercise and may even hinder productivity.** The learning curve can be high for such tools, so if less experienced or tech savvy participants are obligated to use them, it could take a lot of time to get them up to speed, which could otherwise be used for fruitful conversation and collaboration. The use of simpler exercises like writing in the chat or using reaction buttons may help build participants' confidence over time. Similarly, it is helpful to **integrate**

**tools slowly**. If more elaborate collaboration tools are not feasible for your audience, more traditional tools such as Google Docs, PPT, or the built-in whiteboard function could be good alternatives. This is true even for experienced users!

For these reasons, virtual meeting organisers should only employ more advanced collaboration tools after extensive consideration and preparation. The meeting organisers should consider the following questions before making their selection:

- Do the organisers require a subscription to the service? Or will they have to pay a monthly or yearly fee to access the desired functions?
- How many collaborators does the tool support?
- Is registration required for all collaborators to access the tool?
- Is a particular browser required to use the tool?
- How should the collaboration space be prepared in advance? Should a template or grid be set up in advance? Should the key discussions be visible on the platform?
- Will everyone watch the moderator's or producer's shared screen or their own while editing?
- If using a tool in breakout groups, will there be one or multiple editors for the group?

Once selected, the organisers should create a **backup plan** in case the tool does not work or cannot be used as intended. The technical producer and rest of the organising team should be informed about their roles in the session where the tool will be used, including who should harvest the visuals/information and how as well as who will help participants troubleshoot. The decision to use the tool and any relevant information (i.e. link, registration) should be communicated to the attendees in advance. The test call described in section 2.10 is the ideal opportunity to test out the tool with participants. If the test call goes well, you will be ready to use the tool in the meeting. If not, you may consider offering one-on-one support to participants in advance.

The BEACON team has tested several online collaboration tools. A brief description of each can be found in this section.

### 4.2.1 Mural

https://www.mural.co/

*A digital workspace for virtual collaboration*

- Digital whiteboard
- Allows multiple users to post sticky notes, images, and videos on a wall to gather quick feedback about a specific idea, design, or prototype
- Allows users to seamlessly work within the same space, similar to what participants would do in a physical meeting room

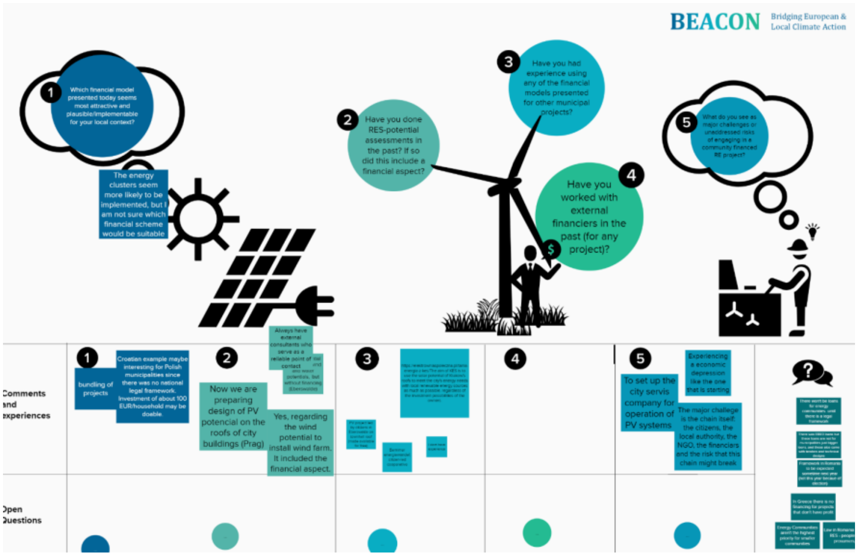


*Figure 5: Mural board from thematic workshop on energy communities*

### 4.2.2 Mentimeter

https://www.mentimeter.com/

*Create interactive presentations and meetings, wherever you are*

- Easy to use live survey and polling tool
- Receive anonymous feedback from participants in real time
- Compatible with mobile
- Free and paid version, the latter with numerous, creative question types


*Figure 6: Mentimeter quiz results from the BEACON Coordination Meeting*

### 4.2.3 Mindmeister

https://www.mindmeister.com/

*Online mind mapping*

- Mind mapping tool used for things like brainstorming, note taking, project planning, idea management, and meeting management
- Built-in templates
- Mind maps can easily be shared or made public
- Can incorporate attachments, visuals, or URLs

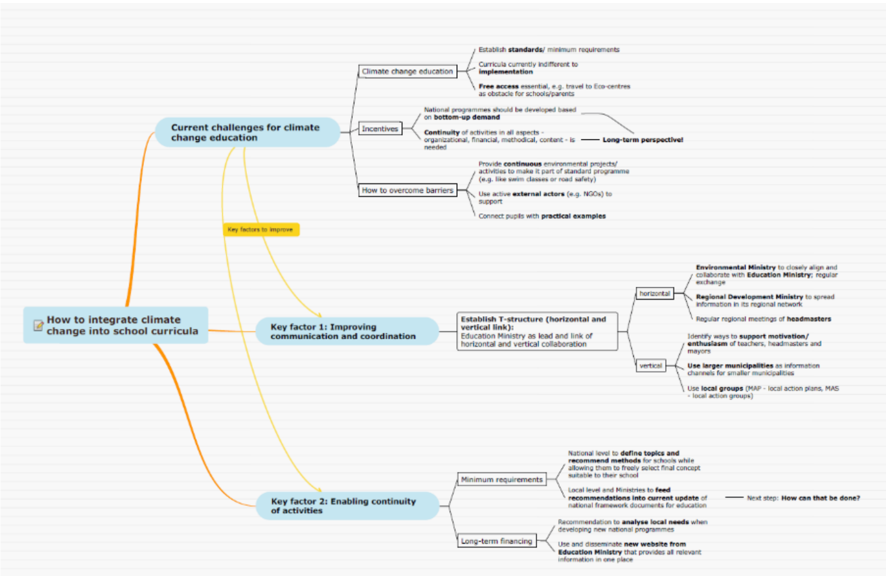


*Figure 7: Mind map from BEACON's vertical workshop in Czech Republic*

### 4.2.4 Miro

https://miro.com/

*A collaborative online whiteboard platform designed for remote and distributed teams*

- Brainstorming with digital sticky notes, planning and managing agile workflows, visual mapping and diagramming
- Integration of a wide range of files and features

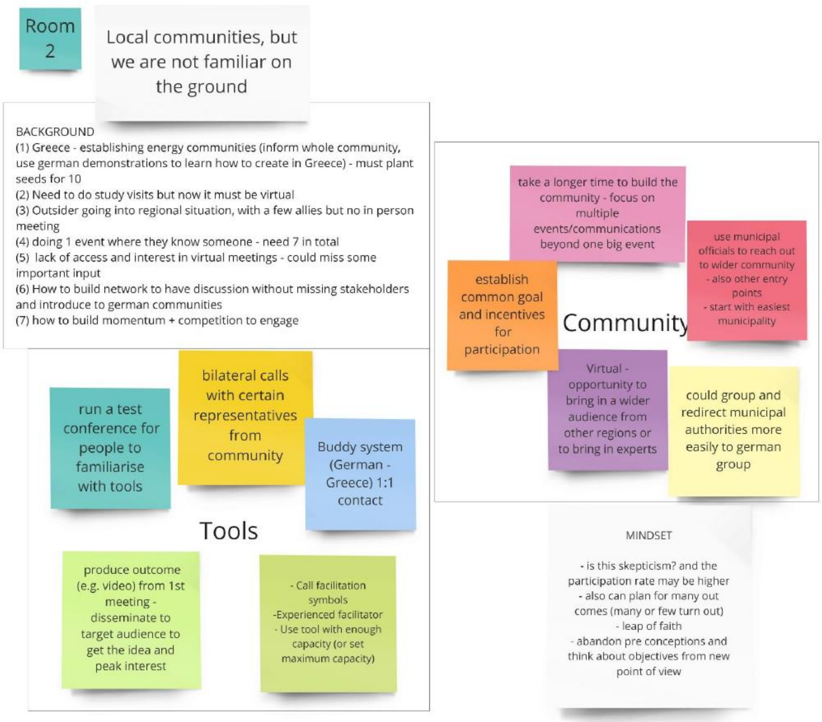


*Figure 8: Screenshot of discussions during the EUKI training - Virtual Stretch Collaboration Training: Multi Stakeholder Dialogues on Climate Crisis*

### 4.2.5 Ideaflip

https://ideaflip.com/

*Online sticky notes for your team*

- Web-based tool for planning, organising, and brainstorming with a team
- Unlimited number of notes, plus uploading, grouping
- Results can be exported to PDF
- No subscription is required to be a guest to a board
- With a free subscription you can create three boards and invite up to two guests to each of them

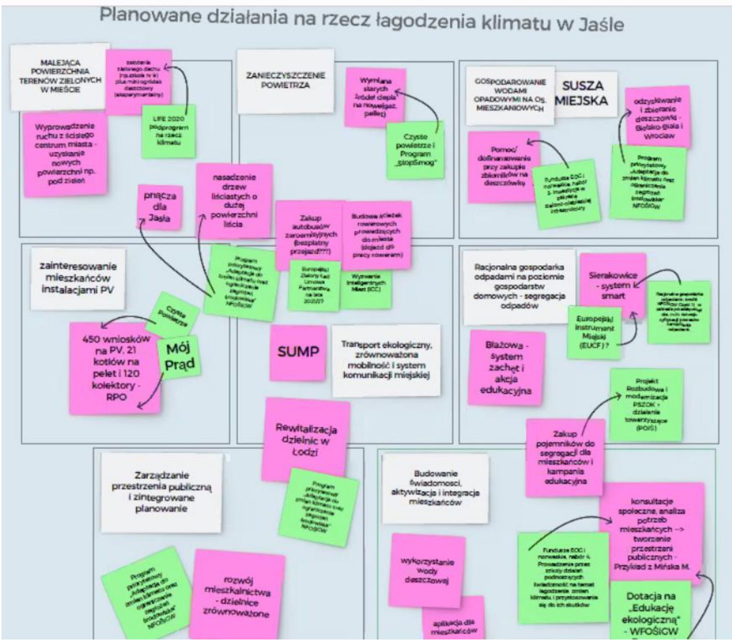


*Figure 9: Screenshot of a mindmap from coaching with Jaslo (Poland) using Ideaflip*

## 4.2.6 Padlet

https://padlet.com/

*Online blank wall board*

- Platform to share information, collect ideas, and brainstorm
- Supports a wide range of file types
- No sign up required and unlimited contributors
- Available in 29 languages

*Figure 10: Screenshot of Padlet wall from thematic workshop on nature-based solutions*

### 4.2.7 Groupmap

https://www.groupmap.com/

*Real-time online brainstorming tool for meetings*

- Works by capturing individual thinking first and then revealing the group perspective for collaborative brainstorming sessions
- Allows the organiser to customise the workflow and creative process
- Over 80 brainstorming templates readily available

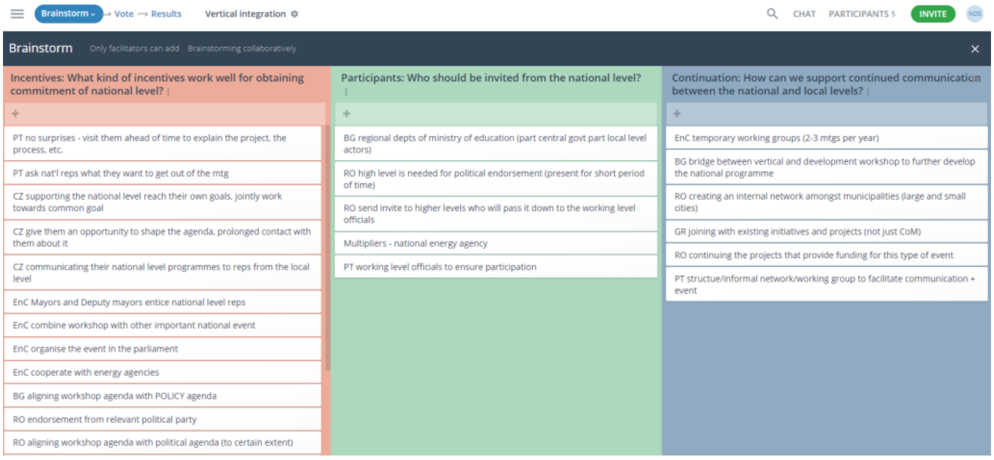


*Figure 11: Results of brainstorm at BEACON's Coordination Meeting*

### 4.2.8 Kahoot

https://kahoot.com/

*Game-based learning platform*

- Numerous pre-made quizzes that can be accessed via a browser or the app
- Can be used for fun activities like trivia and pub quizzes
- Integrations with Microsoft Teams and Zoom

Further resources:

- 11 Best Free Web Video Conferencing and Screenshare Apps of 2020
- The Ultimate List of Virtual Team Technology Tools [2020 Update]
- Online Collaboration Tools
- Tools For Virtual Collaboration

# 5 Conclusion

Designing and hosting effective and enriching online meetings where meaningful conversations take place requires purpose, preparation, caution, attention to detail, flexibility, and connection. It is an ongoing process of repeated reflection, practice, and learning by doing. By devoting extra attention to the capabilities and needs of attendees, hosts can nurture relationships and achieve impactful outcomes despite the restrictions of the online environment. By respecting good practices, hosts play an important role in reducing online meeting fatigue and contribute to peoples' positive associations with the virtual meeting environment, an environment that is here to stay.

BEACON has gained extensive experience working in online formats over the course of 2020 and beyond. While we do not assume to be the authority in online collaboration, we hope that this Guide could inspire and teach its readers something new. These guidelines are a contribution to the ongoing evolution of online meeting design and hosting, a field in constant development. For more information and to help you develop your own way on online working, we invite you to explore the additional resources provided throughout this Guide:

- The Definitive Guide to Facilitating Remote Meetings by Mural
- A Crash Course in Translating Your Process to a Virtual Setting
- Guide: So You Want to Host a Web Meeting?

# 6 Summary Checklist

Below you can find a checklist of numerous things to consider when organising a virtual event. This is not a comprehensive list but rather an overview of the key tasks and considerations from this Guide.

| Organising and designing |
| --- |
| ✓ Define a clear meeting objective. |
| ✓ Create the agenda to serve the purpose of the meeting and reflect an appropriate rhythm in a virtual setting. |
| ✓ Include all relevant information such as expectations, technical requirements, agenda, and supplemental materials in the invitation and pre-event communications. |
| ✓ Review the agenda step-by-step with the organising team and make sure the good practices in terms of timing and breaks as outlined in section 2.4 are respected. When doing so, think through each step of the method you select from the participants' perspective. |
| ✓ Check the time zones of participants in advance and adjust the agenda accordingly. Sending calendar invites to participants and external presenters as well as using timeanddate.com can help avoid confusion. |
| ✓ Select an appropriate mix of session types (e.g. plenary, input presentations, group work and breaks). When in doubt, aim for less frontal input and more engagement and participative processes. Recycle proven collaboration methods to facilitate engaging dialogue (section 2.5). |
| ✓ If breakout groups should be used, pay close attention to how and when they will be set up and moderated. |
| ✓ To encourage a punctual start after a break, include the return time or duration on a slide, ask participants to turn their camera on as soon as they return, and/or turn off music that may have been playing during the break so participants are reminded to return to the meeting. |
| ✓ Consider using icebreakers/energisers at select points during the meeting such as after breaks and in the middle of longer sessions to improve attention and energy levels. |
| ✓ Ensure that note taking is arranged in every session where it is necessary. |
| ✓ Consider how visuals from the meeting will be captured or harvested (incl. screenshots, recordings) but always ask for participants' permission first. |
| ✓ Assign roles amongst the organising team in advance and capture responsibilities in writing in the form of a script or detailed agenda (see section 2.9). Do not assume that anyone will do a particular task – put it in writing! |
| ✓ Hold a rehearsal for the organising team in the days before the meeting to run through the detailed agenda and master slide deck with all presentations and fill any organisational gaps. Print the detailed agenda once final. |
| ✓ Consider holding a short test call with participants in the days before the meeting to explain how to use the video conferencing software and other tools. If you are using simultaneous interpretation, invite the interpreters to this meeting and test the interpretation channels. |
| ✓ Check your equipment and appearance (i.e. tidiness , lighting) before the call. Have back-up equipment available if possible. |

| Facilitating and moderating |
|---|
| ✓ Use a separate channel for organisers to communicate amongst themselves during the meeting. Consider mobile apps to limit the number of windows needed on the computer. |
| ✓ Conduct a check-in session ten to 30 minutes before the meeting, so the group can check their equipment and work out technical issues. During this session, it is helpful to have an informational slide on the screen (in multiple languages if applicable). |
| ✓ Take several minutes at the beginning of the meeting to provide a technical introduction and establish expectations or ground rules. |
| ✓ Consider printing the participants list before the meeting to facilitate a roll call at the beginning of the meeting. |
| ✓ Kick-off the conversation with attendees in an interactive way with an icebreaker or questions that help set the meeting into context and gauge participants' expectations. |
| ✓ Encourage participants to limit the physical and digital distractions in their environment. |
| ✓ Engage participants frequently and in different ways such as breaks, intermittently incorporating quick questions or polls, and planning shorter speaking slots. |
| ✓ Closely track the attention of participants by checking in and posing questions. In doing so, you can check if they are paying attention, understand the content, have questions, or that the moderation has the appropriate tempo. |
| ✓ Regularly remind the group that their participation and contributions are appreciated via verbal and non-verbal signals. |
| ✓ Make sure that all participants (incl. those joining via phone and quieter participants) can contribute by purposefully providing opportunities for them to engage. |
| ✓ Stick to the agenda. If that is not possible, clearly communicate deviations. |
| ✓ Close the meeting with elements like polls to take the temperature of the group and make sure the meeting goals have been accomplished. Before ending the meeting, be sure to communicate next steps and decisions as well as revisit remaining questions. |
| ✓ Send follow up communication to participants containing all necessary information and materials, including a feedback survey if necessary. |

| Collaborating |
|---|
| ✓ Select the appropriate video conferencing platform for your meeting by checking all requirements and permissions, as well as accessibility for participants in advance. |
| ✓ Familiarise yourself with and practice using all functions of the platform that are required for your meeting beforehand. |
| ✓ Consider using a digital collaboration tool to enhance exchange in your meeting but select it with careful consideration and ensure that all participants can use it as desired. Share all relevant information and instructions about the video conferencing software and other collaboration tools with participants in advance and try them during the test call. |
| ✓ Prepare a back-up plan in case the collaboration tool cannot be used as desired. |
| ✓ Introduce new collaboration tools slowly and only as needed. Simpler tools are often sufficient. |